



# IT HEALTH CHECK GUIDE



*For small and medium-sized businesses (SMBs), technology is **both an asset and a risk**. IT systems need to be secure, reliable, and scalable, but they can also become **outdated, inefficient, or costly if left unchecked**.*

## WHY IT MIGHT BE HELPFUL?

Regular IT reviews help businesses

- ✓ Enhance cyber security to **prevent data breaches**
- ✓ Optimise IT costs and **eliminate unnecessary expenses**
- ✓ Improve performance to keep employees **productive**
- ✓ Ensure compliance with **industry regulations**

***This guide will walk you through key IT areas SMBs should assess regularly to keep operations running smoothly.***

# 1

# IT SECURITY & CYBER THREATS

## Why It Matters:

***Cyberattacks are increasing, and SMBs are a prime target. A poor security setup can lead to data breaches, ransomware attacks, and financial loss.***

## Key Questions to Ask:

- *Are your firewalls, antivirus, and anti-malware tools up to date?*
- *Do employees use strong, unique passwords, or a password manager?*
- *Do employees have multi-factor authentication (MFA)?*
- *Do you have regular security training for staff to prevent phishing scams?*
- *Is your data encrypted (both in transit and at rest)?*
- *Are software patches and security updates applied regularly?*

## Action Steps:

- *Perform penetration testing and a cyber security audit at least twice a year.*
- *Implement MFA on all critical accounts.*
- *Back up critical data in multiple secure locations.*

## Suggested Services:

- *Microsoft Business Premium Licenses*
- *Implement permission controls, MFA and device controls*
- *My Glue password manager*
- *Datto K365 for AV, EDR and 24/7 monitoring*
- *Know B4 training software*

# 2

## IT SUPPORT & HELPDESK EFFICIENCY

### Why It Matters:

*Slow IT support leads to downtime, frustration, and lost productivity.*

### Key Questions to Ask:

- *How long does it take for your IT support to respond to issues?*
- *Are employees experiencing recurring IT problems?*
- *Do you have clear IT support documentation for common issues?*
- *Are you using remote support tools for faster troubleshooting?*

### Action Steps:

- *Implement an IT ticketing system to track issues and response times.*
- *Provide self-service IT guides for common problems.*
- *Review your Service Level Agreement (SLA) with IT providers.*

### Suggested Services:

- *CMS support plan*
- *My Glue for documentation*
- *Datto K365*

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## IT INFRASTRUCTURE & HARDWARE

### Why It Matters:

*Outdated hardware can cause slow performance, security risks, and unexpected failures.*

### Key Questions to Ask:

- *Are your servers, workstations, and network devices outdated?*
- *Is there slow performance or frequent crashes?*
- *Are you proactively replacing ageing equipment?*
- *Do employees have the right devices to work efficiently?*

### Action Steps:

- *Audit hardware every 12-24 months.*
- *Replace devices older than 3-5 years.*
- *Consider leasing IT equipment for cost control.*

### Suggested Services:

- *Use CMS to procure hardware & manage warranties.*

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## IT COSTS & SOFTWARE LICENSES

### Why It Matters:

*Many SMBs overspend on IT due to unused software, unnecessary cloud services, and inefficient contracts.*

### Key Questions to Ask:

- *Are you paying for software licenses that employees don't use?*
- *Could you consolidate subscriptions to reduce costs?*
- *Are you on the best pricing plan for cloud services?*
- *Do you track monthly IT expenses?*

### Action Steps:

- *Conduct an IT License audit quarterly.*
- *Eliminate unused software or switch to more affordable alternatives.*
- *Negotiate with vendors for better pricing.*

### Suggested Services:

- *CMS provides and manages Microsoft Licenses & other vendor licenses.*

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## CLOUD & DATA BACKUP STRATEGY

### Why It Matters:

*A backup and disaster recovery plan ensures business continuity.*

### Key Questions to Ask:

- *Are all business-critical files backed up securely?*
- *If a cyber attack or data loss occurs, how quickly can you restore data?*
- *Are you following the 3-2-1 backup rule (3 copies, 2 formats, 1 offsite)?*
- *Do you test your backups regularly?*

### Action Steps:

- *Use automated cloud backups.*
- *Set up redundant backup systems (local & cloud).*
- *Perform disaster recovery tests at least twice a year.*

### Suggested Services:

- *Cloud Backup through Azure*
- *Device backup with Datto or Barracuda*
- *EDR through Datto K365*

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## COMPLIANCE & DATA PROTECTION

### Why It Matters:

*Failing to comply with data protection laws (e.g., GDPR, HIPAA, PCI-DSS) can result in fines and reputational damage.*

### Key Questions to Ask:

- *Are you meeting industry-specific compliance requirements?*
- *Do you have policies for data access, retention, and deletion?*
- *Are employees aware of data protection best practices?*

### Action Steps:

- *Perform an annual compliance audit.*
- *Implement data access restrictions.*
- *Regularly review privacy policies and employee training.*

### Suggested Services:

- *Microsoft Business Premium licenses*
- *KnowB4 training software*

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## EMPLOYEE IT TRAINING & AWARENESS

### Why It Matters:

*Human error is one of the biggest security risks in IT. Employees should be trained regularly on best practices.*

### Key Questions to Ask:

- *Do employees know how to spot phishing emails and scams?*
- *Are they using secure passwords and MFA?*
- *Do you conduct cyber security training at least once a year?*

### Action Steps:

- *Conduct quarterly cyber security awareness training.*
- *Use simulated phishing tests.*
- *Implement password management tools.*

### Suggested Services:

- *KnowB4 training software*



# FINAL THOUGHTS TAKE ACTION TODAY

Regularly reviewing your IT prevents problems before they happen.

SMBs that take a **proactive approach to IT management** can save time, money, and headaches in the long run.

*Need an IT Health Check or Quote to manage your IT?*

**Book Appointment Now!**

